

## Auto Route Scan



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# 1 Preface

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This guide provides the details on how to use the Auto Route Scan workflow

## About This Guide

This guide is divided into following primary sections:

### 1. Introduction

This section lays the foundation for understanding the workflow specification

### 2. Cloud Service Connection

This section describes how to do service connection with external cloud Services like Box, Dropbox, Google Drive, OneDrive for Business, SharePoint Online.

### 3. Configuring Default Values

This section contains step-by-step instructions on how to configure default settings related to Auto Route Scan application in User Site

### 4. Operation of Auto Route Scan Application

This section contains step-by-step instructions on how to operate Auto Route Scan application on MFP Operation panel

### 5. Document Classification Training in Automated Data Capture(CPE)

This section describes step-by-step procedure to train Automated Data Capture (CPE) with various document types

### 6. Limitations

Product Limitations

### 7. Appendix

This section contains additional reference materials

**Note:** The operation panel screen shot images and User Site images provided in this document are for illustrative purposes only. These images may not reflect the exact image you experience on your multi-functional printer (MFP device).

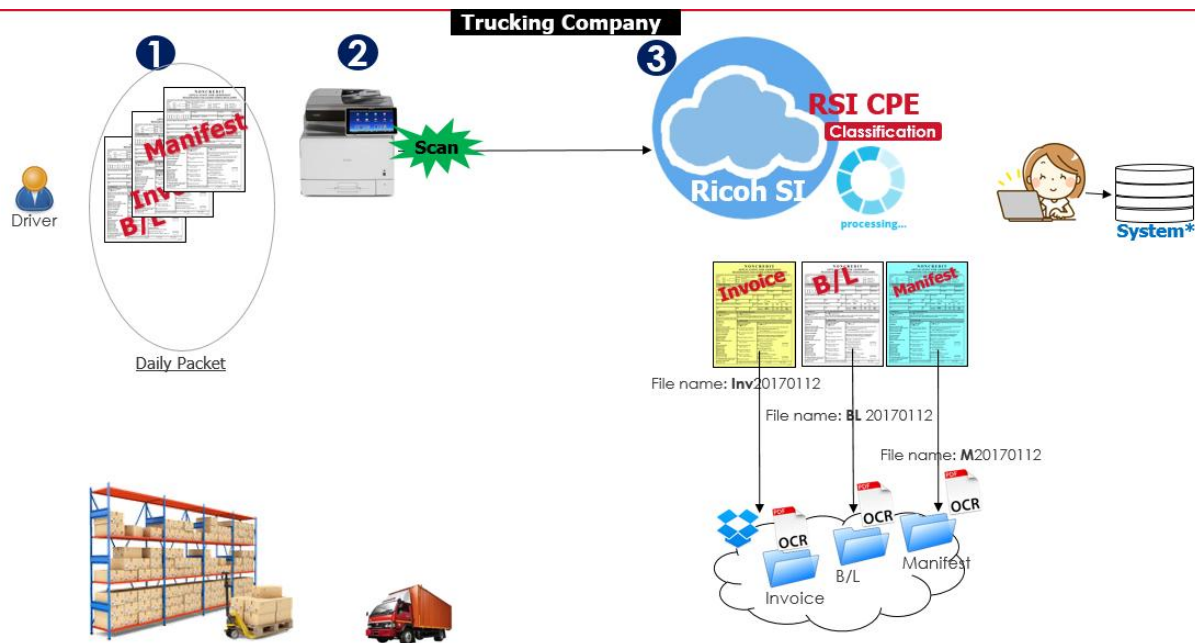
## 2 Introduction

### What is Auto Route Scan workflow?

Auto Route Scan is a workflow application developed on Ricoh Smart Integration Platform.

A typical use case for this workflow is displayed here:

This use case is related to trucking company, but this is applicable to other industries as well. User scans different types of documents using this workflow. Documents are processed through Automated Data Capture (CPE) Classification engine. Documents are automatically matched based on previous training data in to respective category. Documents are stored in to a folder based on the result of Classification engine. To increase the accuracy of the classification, Automated Data Capture (CPE), classification engine needs to be trained with various type of documents used by the company.



## Workflow Specification

OCR	Off, PDF, PDFA, WORD, EXCEL Default: Off
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Default values can be configured for OCR and Scan Settings.

## 3 Cloud Service Coordination

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### What is Cloud Service Coordination?

Before using Auto Route Scan, user need to establish connection (authentication) with Cloud service of choice. As of now following Cloud Services are supported.

1. Box
2. Dropbox
3. Google
4. OneDrive for Business
5. SharePoint online

For each Cloud Service there is a separate Auto Route Scan application available On MFP Operation Panel.

**Refer to Smart Integration Cloud Service Connections User Guide for step-by-step instructions.**

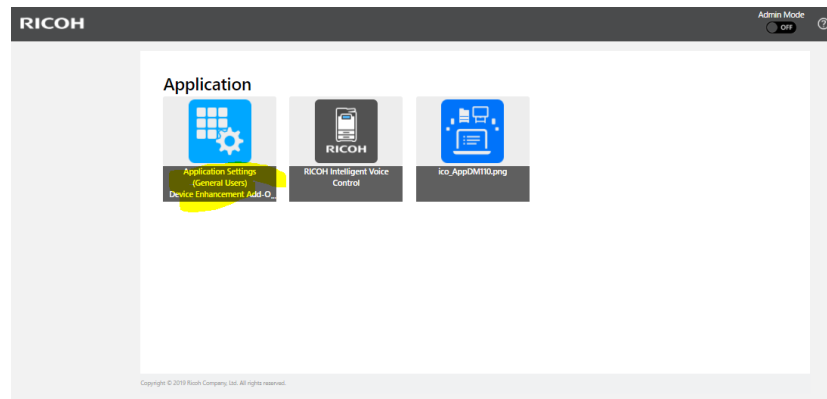
## 4 Configuring default Values

### Smart Integration User Configuration Site URL

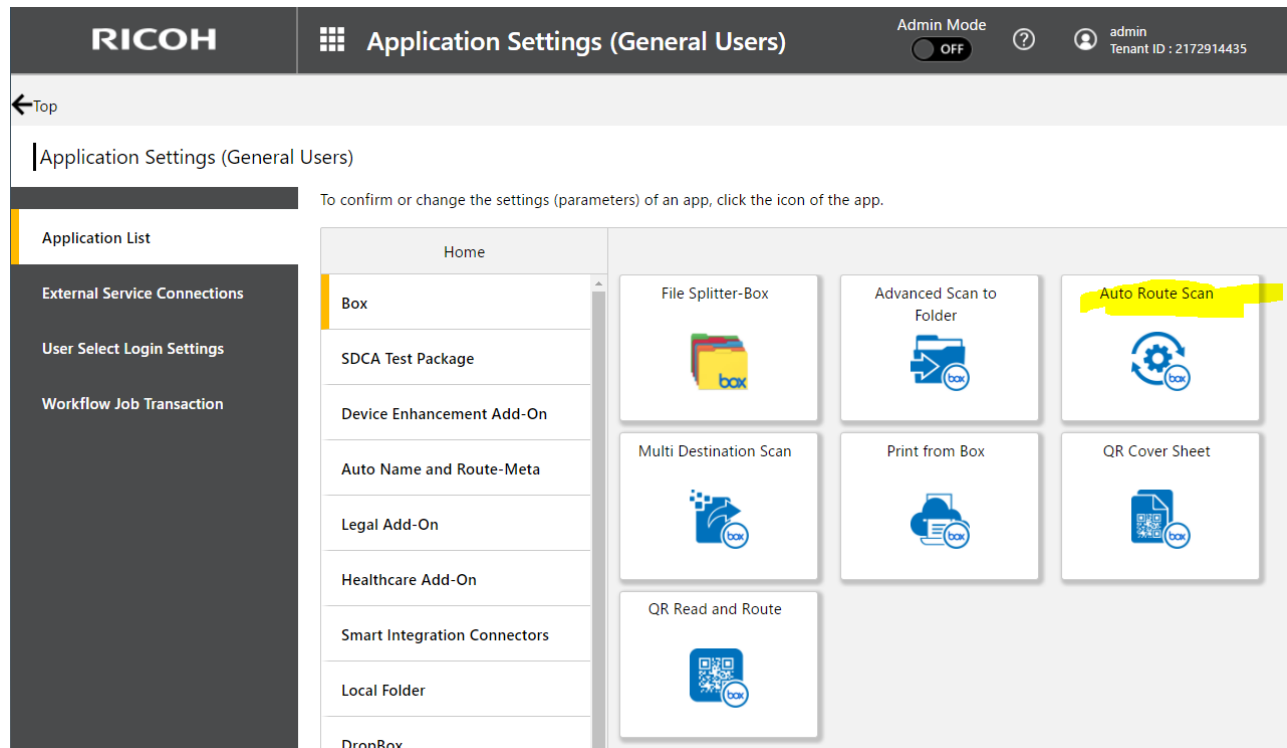
<https://www.na.smart-integration.ricoh.com/site/home>

### Configuring Default Values for Auto Route Scan

To configure Auto Route Scan, it is necessary to login to user site using **user** credentials.



Click on 'Application settings (General User)'



Click on 'Auto Route Scan'. This will display a page where all necessary parameters can be configured.

← Application List

### Auto Route Scan

Cancel Save

\* Mandatory field

#### External Service Settings: Box

Folder \* Select Folder All Files

[Open External Service Connections](#)

#### Common Settings

Default Screen for Folder Browsing List Screen

Default Layout for Folder Browse 2 Rows

#### Default Parameter Settings

OCR OFF

#### Default Scan Settings

Scan Color Mode Auto Color Select

Original Sides 1 Sided

Document Orientation Readable Direction

Scan Resolution 300 dpi

Document Size Auto

Manual Density 0

Scan Method Normal

Preview On

## Settings available for Auto Route Scan

### OCR

#### Default Parameter Settings

OCR  ▾

OCR: PDF, PDF/A, WORD, EXCEL

### Folder

Root folder can be configured. This setting is only available in User Site.

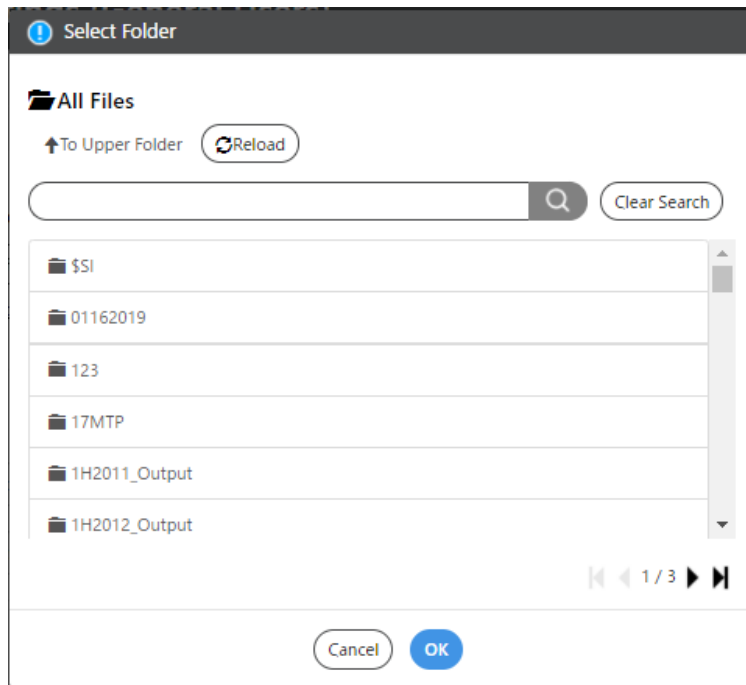
\* Mandatory field

#### External Service Settings: Box

Folder \*  All Files

[Open External Service Connections](#) 

Clicking on select Folder will open Folder Browsing dialog. Click on desired root folder and click on 'OK' button.



## Scan Settings

Default Scan settings can be configured here

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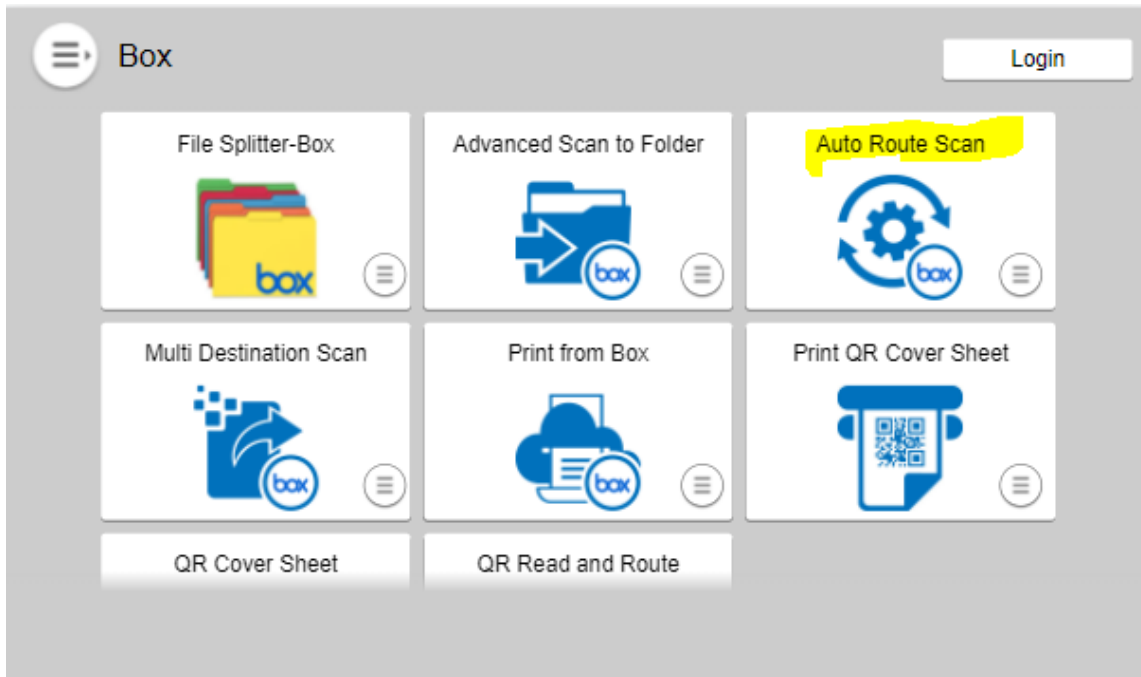
**Default Scan Settings**

Scan Color Mode	Auto Color Select ▼
Original Sides	1 Sided ▼
Document Orientation	Readable Direction ▼
Scan Resolution	300 dpi ▼
Document Size	Auto ▼
Manual Density	0 ▼
Scan Method	Normal ▼
Preview	On ▼

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## 5 Operation of Auto Route Scan Application



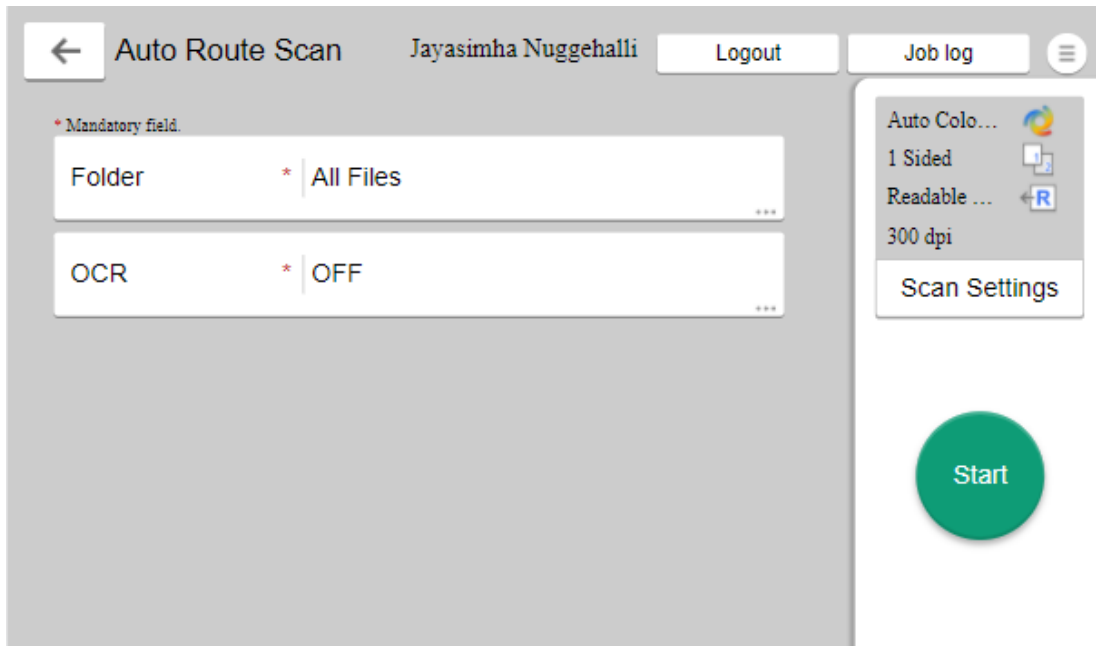
Select 'Auto Route Scan' application.

Users need to Login to the application. Press 'Login' Button to Login after entering credentials.

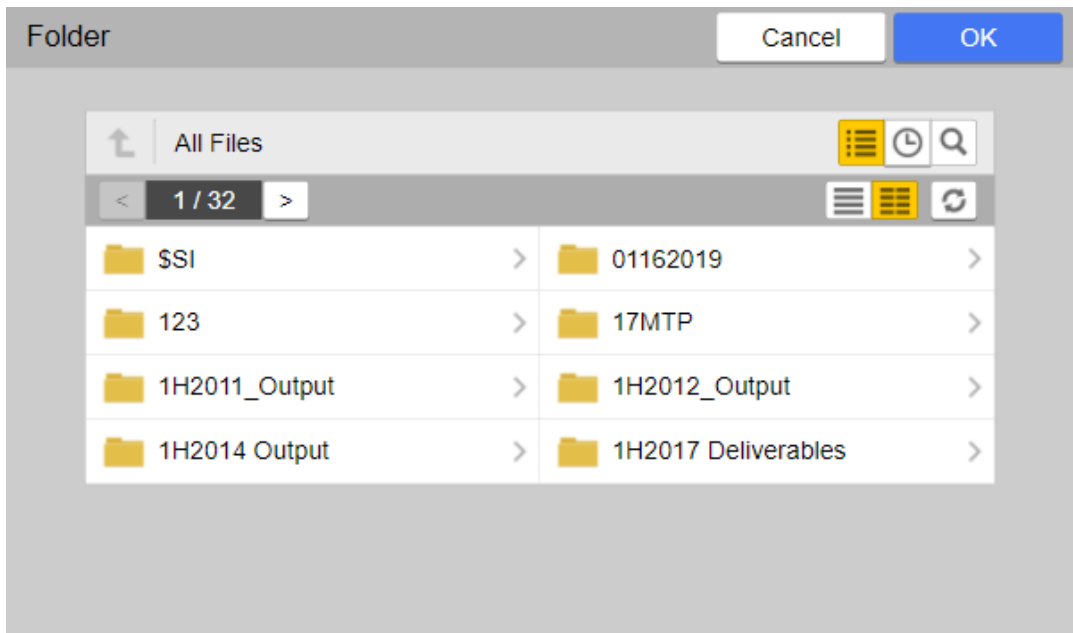
Note: RSI supports multiple login Methods. Default login method can be configured in RSI portal (Workplace).

A screenshot of the login form titled 'Login to RICOH Smart Integration'. At the top left is a back arrow icon. Below the title is a dropdown menu labeled 'Login with Tenant ID'. The form contains three input fields: 'Tenant ID' with the value '2172914435', 'User ID', and 'Password'. Below the 'Password' field is a checkbox labeled 'Show password'. At the bottom right is a blue 'Login' button.

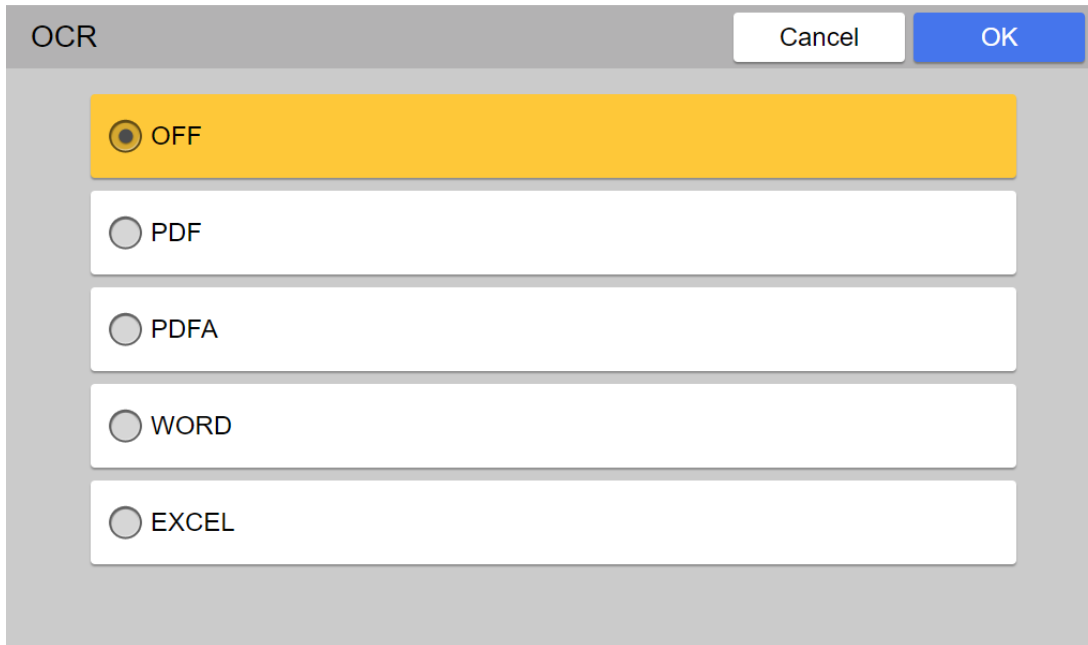
After successful user login 'Auto Route Scan' Application Screen is displayed



Touching on Folder, opens up Folder Browsing screen to select Folder. Select desired folder



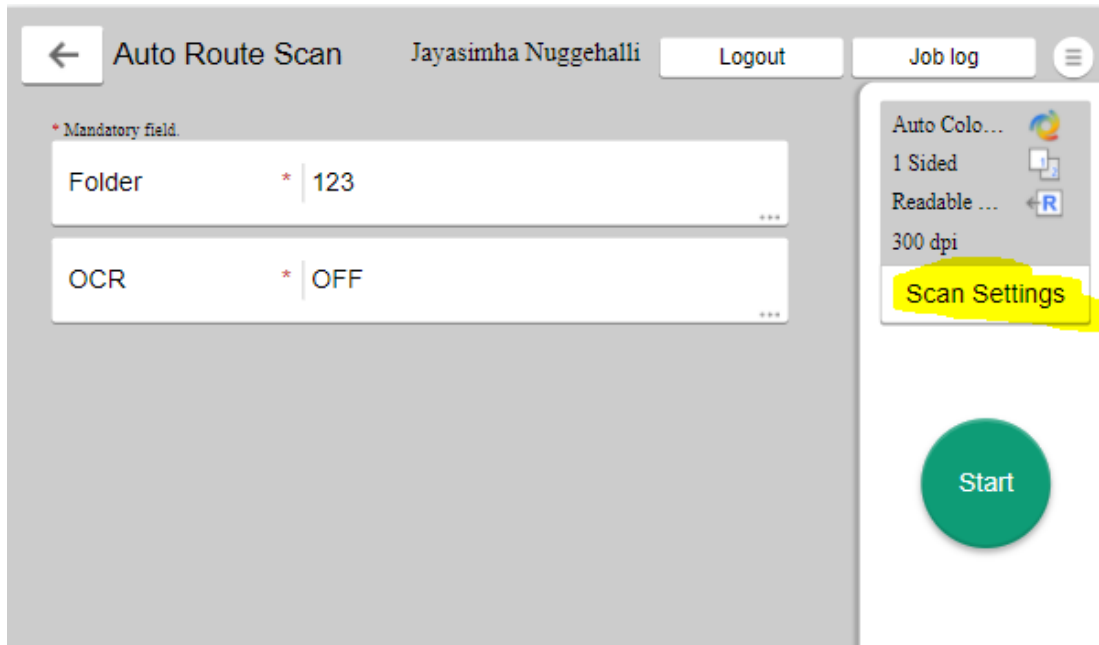
Touching on OCR, selection field displays available OCR Options



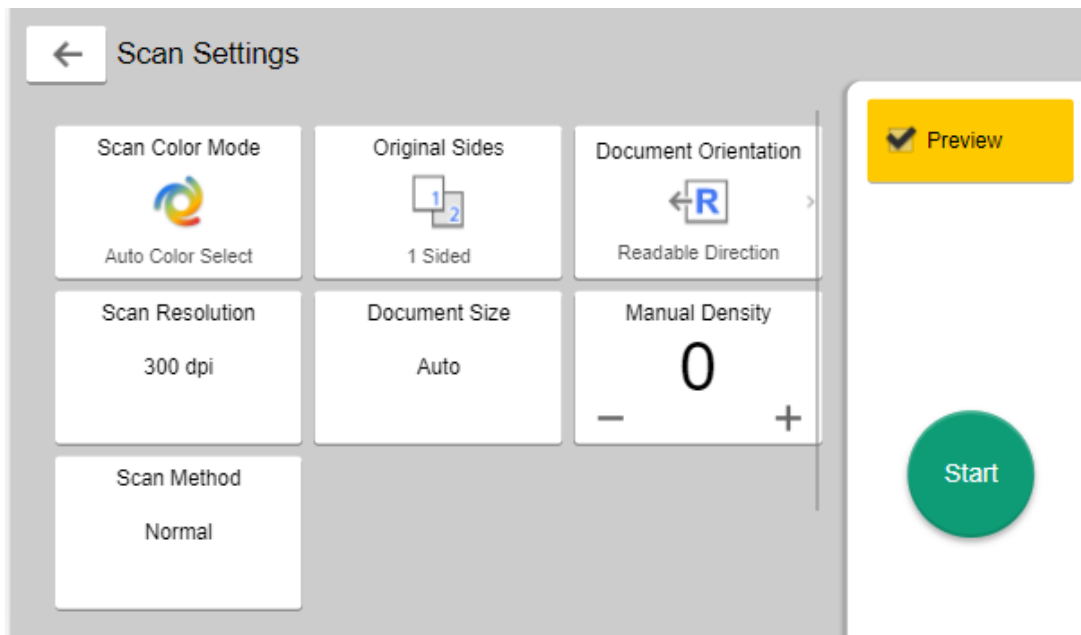
The image shows a dialog box titled "OCR" with a grey background. At the top right, there are two buttons: "Cancel" and "OK". The "OK" button is highlighted in blue. Below the title bar, there are five radio button options, each in a white rectangular box with a grey border. The first option, "OFF", is selected and its background is highlighted in yellow. The other options are "PDF", "PDFA", "WORD", and "EXCEL".

Select the desired OCR option.

## Scan Settings



Touch on 'Scan Settings' to display Scan Settings Screen



Scan Settings	Available Options
<p>Scan Color mode</p>	<p>← Scan Color Mode</p> <p> <input checked="" type="radio"/> Auto Color Select                 <input type="radio"/> B&amp;W (Binary) Text             </p> <p> <input type="radio"/> B&amp;W (Binary) Text/Photo                 <input type="radio"/> B&amp;W (Binary) Text/Line Art             </p> <p> <input type="radio"/> B&amp;W (Binary) Photo                 <input type="radio"/> Gray Scale             </p> <p> <input type="radio"/> Full Color Text/Photo                 <input type="radio"/> Full Color Photo             </p> <p>Preview</p> <p>Start</p>
<p>Original Sides</p>	<p>← Scan Settings</p> <p>                 Scan Color Mode: <input checked="" type="radio"/> Auto Color Select             </p> <p>                 Scan Resolution: 300 dpi             </p> <p>                 Scan Method: Normal             </p> <p>                 1 Sided <input checked="" type="radio"/>                 2 Sided (Open to Right/Left) <input type="radio"/>                 2 Sided (Open to Top) <input type="radio"/>                 Spread <input type="radio"/> </p> <p>                 Document Orientation: <input checked="" type="radio"/> Readable Direction             </p> <p>                 Manual Density: 0             </p> <p>Preview</p> <p>Start</p>
<p>Document Orientation</p>	<p>← Document Orientation</p> <p> <input checked="" type="radio"/> Readable Direction                 <input type="radio"/> Unreadable Direction             </p> <p>Preview</p> <p>Start</p>
<p>Scan Resolution</p>	<p>← Scan Resolution</p> <p> <input type="radio"/> 100 dpi                 <input type="radio"/> 200 dpi             </p> <p> <input checked="" type="radio"/> 300 dpi                 <input type="radio"/> 400 dpi             </p> <p> <input type="radio"/> 600 dpi             </p> <p>Preview</p> <p>Start</p>

Document size	 <p>The screenshot shows two instances of the 'Document Size' settings screen. The top instance has 'Auto' selected, with other options including Mixed, A3 (Horizontal), JIS B4 (Horizontal), A4, A4 (Horizontal), JIS B5, JIS B5 (Horizontal), and A5 (Horizontal). The bottom instance has 'A5' selected, with other options including A5 (Horizontal), 11 x 17 (Horizontal), Legal (Horizontal), 8 1/2 x 13 (Horizontal), Letter, Letter (Horizontal), Invoice (Half Letter Size), and Invoice (Horizontal). Both screens feature a 'Preview' button and a 'Start' button.</p>
Manual Density	Range -3 to +3
Scan Method	 <p>The screenshot shows the 'Scan Settings' interface. It includes fields for 'Scan Resolution' (300 dpi), 'Document Size' (Auto), and 'Manual Density' (3). Below these are 'Normal' and 'Batch' scan method options. A 'Preview' button and a 'Start' button are also visible.</p>

## 6 Document Classification Training in CPE


Login to CPE account using you CPE Credentials

URL: <https://cpe.ricoh-usa.com>




### What is it?


Cloud data extraction tool



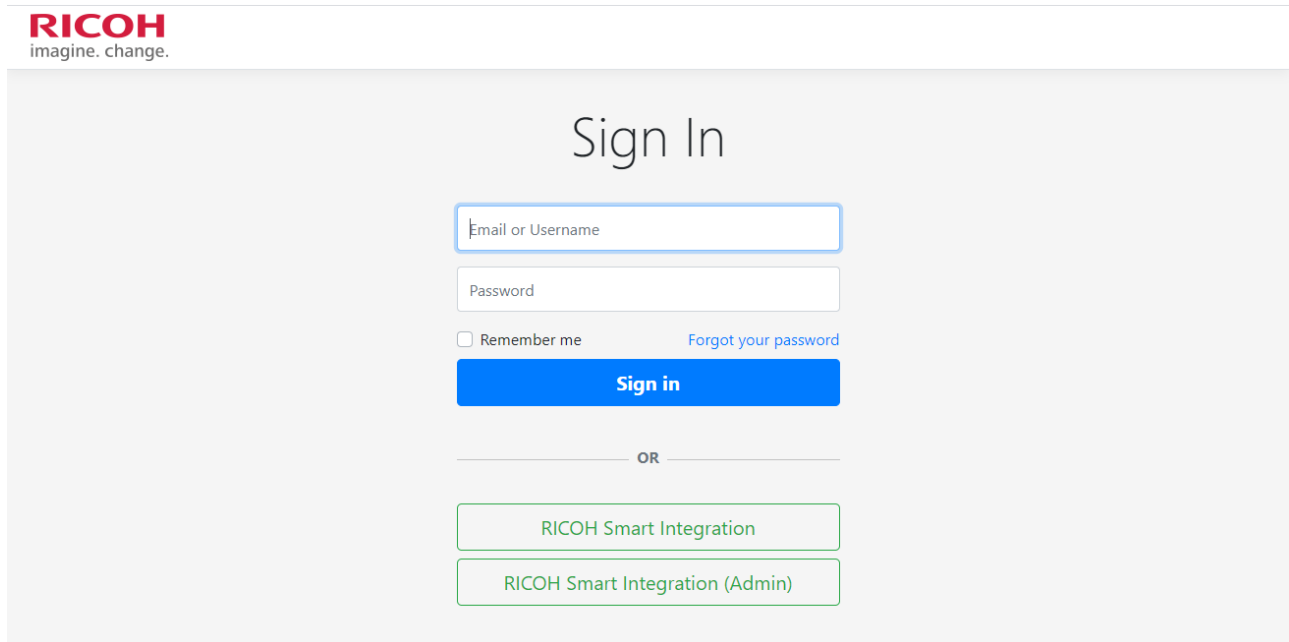
Easy creating of form recognition template



Multiple input includes Email, Local File, and Cloud Storage



Seamlessly integrates with Kintone, IceT for process automation



Login with your credentials

The screenshot shows the RICOH dashboard with the 'CLASSIFICATION' menu open. The menu options are: Train Categories, Classification Settings, Classification History, and Classify File. The 'Train Categories' option is highlighted. Below the menu, there are sections for 'Parsing Rules' (Total: 3 parsing rule(s)), 'Processed Records' (Total: 12 record(s), Unverified: 0 record(s)), 'Recent Parsing' (listing Invoice Empire Import, StudentRegForm-PR, and BillOfLanding), and 'Recent Processed Records' (listing several invoice files with their respective dates and times).

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Click on 'Classification' Menu and select 'Train Categories'

**Note:** 'Train Categories' feature is available only for Administrator.

The screenshot shows the 'Training Classification Model' page. It has two main sections: 'Your Organization' and 'Preview'. In the 'Your Organization' section, there are two radio buttons: 'Use default categories' (highlighted in yellow) and 'Create and use custom categories'. Below these are several categories listed with dropdown arrows and delete icons: SDCA Invoice, SDCA Quotation, SDCA Manifest, SDCA Packing List, 1099-MISC Form, SDCA Bill Of Landing, and SDCA Purchase Order. The 'Preview' section is currently empty.

Select 'Use Default categories' to choose the Trained Categories out of the box. Or start creating custom Categories based on your business needs



Clicking on this will add new category.



### Training Classification Model


**Your Organization**

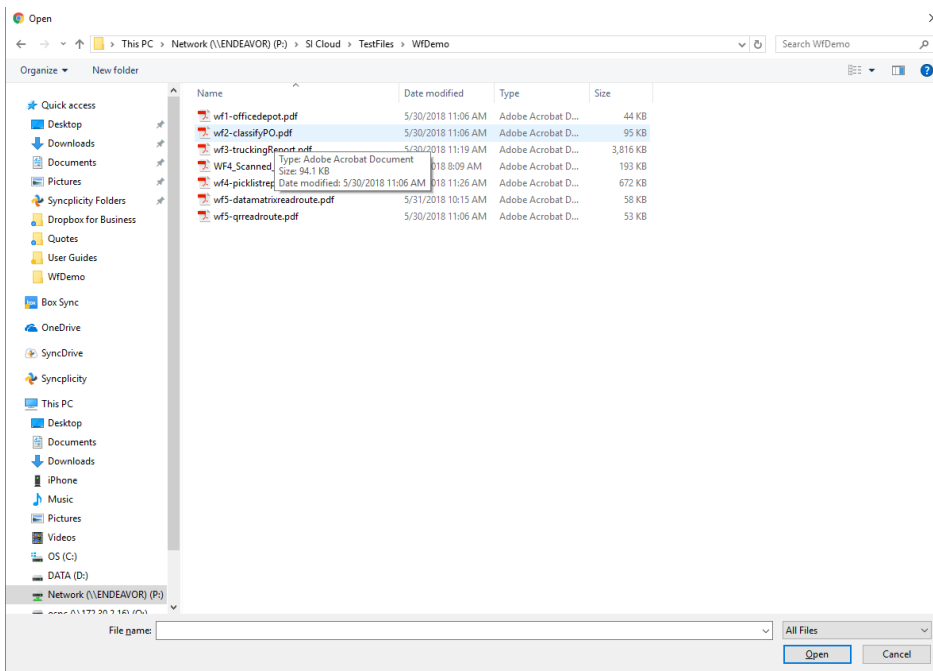
Use default categories

Create and use custom categories

- SDCA Invoice
- 1-Inv.pdf
- 1-Inv - Copy (2).pdf
- 1-Inv - Copy.pdf
- SDCA Quotation
- SDCA Manifest
- SDCA Packing List
- 1099-MISC Form
- SDCA Bill Of Landing
- SDCA Purchase Order

**Preview**

Expand the categories to add new document to the category. Click on Upload  ICON to upload new document to desired category.



### Training Classification Model

Your Organization

Use default categories

Create and use custom categories

SDCA Invoice

- 1-Inv.pdf
- 1-Inv - Copy (2).pdf
- 1-Inv - Copy.pdf
- wf2-classifyPO.pdf

SDCA Quotation

SDCA Manifest

SDCA Packing List

1099-MISC Form

SDCA Bill Of Landing

SDCA Purchase Order

Preview wf2-classifyPO.pdf

**New World Company**  
Floor 100, 100 Main Street  
C.P.O. Box 100 Globelink Globalnet, 1000  
Tel: 999-999-9999 Fax: 999-999-9999

TO: Acme Parts Corporation  
1223 Kallon Street  
Globelink, Globeland 1000  
(via FAX 999-999-9999)

**PURCHASE ORDER**

SHIP TO: The New World Company  
2467 Pioneer Road  
Globelink, Globeland, 1000  
Attn: Shipping/Mary

<b>P.O. Number</b>	NW-01-16366
<b>P.O. Date</b>	Feb/28/2001
<b>Resale No.</b>	SIR AC 16-943236
<b>GSA Sale</b>	No
<b>Phone</b>	(999) 999-9999
<b>Contact</b>	John Hancock

FOB: Vendor/Globelink Globeland SHIP VIA: LIPS TERMS: Net 30 days

ITEM	QUANTITY	PART NUMBER	DESCRIPTION	REQUIRED DATE	UOM	UNIT PRICE	PRICE	QUOTE NO.
001	10	F54749	NW Globe Chassis, 1492 Model	28/02/01	EA	29.50	295.00	Q84645
002	15	F85352	NW Globe Light Kit	28/02/01	EA	19.00	285.00	Q84646
003	6	F84352	NW Globe 30" Oak Stand	28/02/01	EA	30.00	180.00	Q84647
004	20	L86355	NW Atlas Leather-Bound	28/02/01	EA	25.00	500.00	Q84648
005	12	L86365	NW Atlas Young Readers Series	28/02/01	EA	10.00	120.00	Q84649
006	40	A86357	NW Pen Rollerball	28/02/01	EA	7.50	300.00	Q84650
007	25	A86362	NW Pen Fountain	28/02/01	EA	16.00	400.00	Q84651
008	50	A86552	NW Globe Beach Balls, 24"	28/02/01	EA	5.00	250.00	Q84652
009	100	A84352	NW Promotional Calendars	28/02/01	EA	0.10	10.00	Q84653
010	100	A96352	NW Promotional Balloons	28/02/01	EA	0.15	15.00	Q84654

1. PURCHASE ORDER NUMBER, PART NUMBER AND QUANTITY MUST SHOW ON EACH CARTON.

2. Two packing sheets must accompany each shipment.

3. Protection of Material in Transit. All articles delivered on this order to be packed adequately to prevent any damage in shipment and storage. Use of newspaper and glassine bags prohibited. All packages to be properly identified.

4. Seller must execute acknowledgment copy hereof and return to buyer. No other form of acceptance is binding on buyer. Buyer expressly limits acceptance to the terms stated herein and any additional or different terms proposed by seller shall not be binding on buyer, whether or not they would materially alter this order, and are rejected.

5. ANY BOX OVER 50 KILOS WILL BE REFUSED.

SUB-TOTAL	2,355.00
TAX	141.50
<b>TOTAL</b>	<b>2,496.50</b>

P.O. ACKNOWLEDGED BY: \_\_\_\_\_ BUYER: John Hancock DATE: Feb/28/2001

New document is added to the category. Now the system is trained to recognize this document.

## 7 Limitations

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### User Site Limitations

- Supported Browsers for User Site are:
  - Internet Explorer: 11 or later
  - Edge: Latest Version
  - Chrome: Latest Version
  - Firefox: Latest Version
- Limitations for Home Screen/Applications
  - Home: Maximum 20 for each profile, Max 32 characters for the name.
  - Applications: Maximum 18 for each home screen, Max 32 characters for the name
- User Management
  - Email address is unique in the system; same Email address cannot be used even if user belongs to different Tenants
  - Users belong to same tenant cannot set different time zones
  - User cannot change their login Email address, need admins assistance to change email address